

CRUISE VISITORS

ARRIVALS BY AIR AND BY CRUISE SHIPS

LENGTH OF STAY

CRUISE VISITOR DAYS

TOTAL CRUISE PASSENGERS BY MMA

DAILY SPENDING BY CATEGORY AND BY

MMA



CRUISE SHIP PASSENGERS IN HAWAII

Hawaii's cruise ship industry flourished in 2002. In addition to the 63,776 out-of-state visitors who arrived by cruise ships, another 171,251 out-of-state visitors also came by air to board cruise ships touring the islands. Combined, there were 235,027 cruise visitors to the state, up 52.3 percent from a year ago.

In addition to two cruise ships home-ported in Hawaii, 55 out-of-state cruise ships made 131 tours around the islands during the year. There were also two Hawaii home-ported ships in 2001 but only 40 out-of-state cruise ships made 136 tours carrying 154,357 out-of-state visitors.

Point of Origin and Island Visitation

In total there were 242,144 passengers aboard cruise ships in the islands during 2002, 97 percent were out-of-state visitors while 7,117 passengers were Hawaii residents.

By the nature of the cruise routes, these passengers visited most of the neighbor islands. All of the cruise passengers visited Oahu, 95.6 percent visited Maui, 94.8 percent visited the Big Island and 93.4 percent visited Kauai. In addition to their cruise itinerary, 2,821 passengers visited Lanai while 2,073 visited Molokai.

Visitors from the U.S. East comprised the largest percentage of out-of-state passengers (54.6%), followed by visitors from U.S. West (30.3%), Canada (6.6%), Europe (2.4%), and others (6.1%).

Over half of the out-of-state passengers (59.7%) were repeat visitors to the islands, while 40.3 percent came to Hawaii for the first time.

Nearly 84 percent of the passengers cruised the islands for leisure, 8.5 percent visited friends and relatives, 4.1 percent were on their honeymoon while 2.8 percent played golf.

Length of Stay and Type of Accommodation

The total average length of stay by out-of-state cruise passengers in 2002 was 7.00 days. In addition to the average of 4.55 days these passengers spent aboard ship touring the islands and the 1.24 days they spent on shore after their cruise was over, visitors who arrived in Hawaii by air stayed an average of 1.22 days in Hawaii before their cruise.

Passengers from Canada spent the most time in the islands at 7.95 days. Their average length of cruise was 4.73 days and they also spent 1.88 days on shore after their cruise was over. The average length of stay by European visitors was 7.57 total days, of which 4.64 days were spent on ship and 1.36 days were spent post cruise. U.S. West visitors spent an average of 6.97 total days in the islands, 4.52 days aboard ship and 1.34 days after cruise. The average length of stay by U.S. East visitors was 6.79 days, 4.54 days of which were spent on ship and 1.04 spent after the cruise was over.

Of those out-of-state who spent extra nights in Hawaii either before or after their shipboard cruises, 58.7 percent chose to stay in hotels. Other types of lodging used by cruise visitors during their extra nights included condominiums (3.5%), timeshare properties (2.1%) and staying with friends and relatives (2.0%).

Cruise Visitor Expenditures

The average out-of-state cruise visitor in 2002 spent approximately \$99 per person per day (PPPD) while on shore in Hawaii. This amount is comprised of tour costs and other on-land expenditures such as lodging, food and beverages, shopping, transportation and entertainment.

U.S. East cruise visitors spent the most at \$105 PPPD, followed by visitors from Europe (\$93), Canada (\$91), and the U.S. West (\$90). In contrast, daily spending by Hawaii resident cruise passengers was only \$43 per person.

U.S. East and U.S. West cruise visitors spent more on shore tours than on shopping and food and beverages. In contrast, European and Canadian cruise visitors spent a higher proportion of their daily expenditure on food and beverages and shopping than on shore tours.

Of those cruise visitors who stayed extra nights in Hawaii before or after their cruise, European visitors spent the most for lodging, followed by those from Canada, U.S. East and U.S. West.

Expenditure data were not available for visitors from Japan, China, Latin America, or Australia due to their small sample size in the survey.

TABLE 64: 2001 Cruise Ship Visitors

2001	SHIP ARRIVALS FROM OUT- OF-STATE 1/	NUMBER OF TOURS	NUMBER OF VISITORS			AVERAGE LENGTH OF STAY (DAYS)	VISITOR DAYS
			ARRIVED BY SHIPS	ARRIVED BY AIR	TOTAL		
JANUARY	8	18	5,559	8,653	14,212	7.41	105,243
FEBRUARY	3	10	2,968	5,913	8,881	7.73	68,615
MARCH	6	15	6,510	9,312	15,822	7.75	122,559
APRIL	3	14	5,161	10,128	15,289	7.19	110,003
MAY	3	13	3,900	9,832	13,732	7.40	101,554
JUNE	0	8	-	7,121	7,121	9.33	66,431
JULY	0	9	-	9,476	9,476	9.28	87,933
AUGUST	0	10	-	11,300	11,300	9.84	111,193
SEPTEMBER	3	13	3,101	9,724	12,825	8.03	102,941
OCTOBER	8	12	9,150	10,744	19,894	8.06	160,280
NOVEMBER	4	8	5,635	8,398	14,033	6.80	95,482
DECEMBER	2	6	4,587	7,186	11,773	5.83	68,664
TOTAL	40	136	46,571	107,786	154,357	7.78	1,200,897

1/ Ship arrivals excludes Hawaii home-ported ships (Independence, Patroit, and Norwegian Star).

Number of tours, visitors, and visitor days include all ships. Some ships came multiple times.

Source: DBEDT and Hawaii State Department of Transportation, Harbors Division.

TABLE 65: 2002 Cruise Ship Visitors

2002	SHIP ARRIVALS FROM OUT- OF-STATE 1/	NUMBER OF TOURS	NUMBER OF VISITORS			AVERAGE LENGTH OF STAY (DAYS)	VISITOR DAYS
			ARRIVED BY SHIPS	ARRIVED BY AIR	TOTAL		
JANUARY	8	10	5,122	9,198	14,320	7.38	105,656
FEBRUARY	3	10	6,261	12,468	18,729	8.19	153,461
MARCH	6	12	8,652	10,656	19,308	7.16	138,198
APRIL	8	16	8,317	16,770	25,087	6.66	167,045
MAY	5	13	8,894	16,261	25,155	6.79	170,877
JUNE	0	5	-	12,232	12,232	6.43	78,632
JULY	2	6	528	10,124	10,652	6.50	69,190
AUGUST	0	4	-	9,987	9,987	6.87	68,608
SEPTEMBER	5	14	6,078	19,959	26,037	6.78	176,618
OCTOBER	7	17	10,356	21,092	31,448	6.87	216,039
NOVEMBER	5	12	5,796	16,072	21,868	6.76	147,919
DECEMBER	6	12	3,772	16,432	20,204	7.57	152,947
TOTAL	55	131	63,776	171,251	235,027	7.00	1,645,189

1/ Ship arrivals excludes Hawaii home-ported ships (Norwegian Star and Norwegian Wind).

Number of tours, visitors, and visitor days include all ships. Some ships came multiple times.

Source: DBEDT and Hawaii State Department of Transportation, Harbors Division.

Table 66: 2002 Total Cruise Passengers by MMA

	Passenger Type			Visitors by MMA				
	Total	Out-of-State Visitors	Hawaii Residents	US West	US East	Canada	Europe	Other
Total Passengers	242,144	235,027	7,117	71,312	128,252	15,570	5,533	14,361
Island Visitation (Number of Passengers)								
Oahu	242,144	235,027	7,117	71,312	128,252	15,570	5,533	14,361
Kauai	226,152	219,505	6,647	66,602	119,782	14,542	5,167	13,412
Maui County	231,541	224,735	6,806	68,189	122,636	14,888	5,290	13,732
Maui	231,541	224,735	6,806	68,189	122,636	14,888	5,290	13,732
Molokai	2,073	2,002	71	517	1,153	153	64	114
Lanai	2,821	2,776	44	889	1,514	99	62	212
Big Island	229,511	222,765	6,746	67,591	121,561	14,758	5,244	13,611
Number of islands visited	3.50	3.50	3.47	3.51	3.52	3.45	3.42	3.40
Purpose of Trip (Number of Passengers)								
Honeymoon	9,883	9,752	131	2,485	5,587	770	194	715
Wedding	1,689	1,682	7	382	1,007	126	20	146
Convention / Conference	2,128	2,090	38	523	1,177	222	30	137
Business	3,825	3,610	215	1,328	1,872	217	12	181
Visit Friends or Relatives	20,453	19,426	1,027	8,862	8,597	897	331	739
Play Golf	6,662	6,532	130	2,023	3,523	570	117	298
Leisure	202,259	196,527	5,732	57,064	108,796	13,393	4,863	12,412
Type of Accomodation Before or After Cruise (Number of Passengers)								
Hotel	138,497	137,992	505	34,963	78,710	10,179	3,991	10,149
Hotel only	128,904	128,548	355	31,476	74,146	9,487	3,712	9,728
Condo	8,662	8,331	331	3,678	3,573	680	74	326
Condo only	3,967	3,695	272	1,643	1,515	323	31	183
Timeshare	4,934	4,882	51	1,746	2,368	267	282	219
Timeshare Only	1,687	1,687	0	721	798	58	38	73
Bed & Breakfast	1,413	1,352	61	295	841	75	44	97
Bed & Breakfast only	336	336	0	78	221	0	0	36
Friends & relatives	5,075	4,749	326	2,042	2,103	290	57	257
Friends only	2,569	2,392	177	1,211	954	115	13	99
Other accomodation	7,185	4,800	2,385	1,540	2,515	355	96	294
Other accomodation only	4,957	2,719	2,239	906	1,368	241	45	160
Average Length of Stay (days)								
Total Length of Stay in Hawaii	6.94	7.00	4.99	6.97	6.79	7.95	7.57	7.84
LOS in Hawaii Before Cruise	1.18	1.22	0.04	1.10	1.21	1.35	1.56	1.57
LOS in Hawaii During Cruise	4.53	4.55	4.16	4.52	4.54	4.73	4.64	4.50
LOS in Hawaii After Cruise	1.23	1.24	0.79	1.34	1.04	1.88	1.36	1.76
Type of Visitors								
First Timers	97,139	94,743	1,241	14,640	66,139	5,695	4,050	5,617
Repeat Visitors	145,005	140,284	5,876	56,672	62,113	9,875	1,483	8,744

Source: DBEDT

Table 67. Per Person Per Day Spending by Category and by MMA

	Passenger Type		Visitors by MMA Expenditure				
	Resident in		US West	US East	Canada	Europe	Other
	Visitor	Hawaii					
Total Lodging	\$20.0	\$3.9	\$16.9	\$21.2	\$22.4	\$24.0	\$21.2
Total Food & Beverage	\$13.7	\$7.9	\$13.0	\$13.8	\$15.1	\$14.1	\$15.0
Food at Restaurants	\$7.1	\$2.8	\$6.4	\$7.2	\$8.1	\$8.9	\$7.5
Dinner Shows	\$3.4	\$2.3	\$3.3	\$3.6	\$2.9	\$1.3	\$3.9
Groceries	\$1.3	\$1.5	\$1.4	\$1.1	\$2.1	\$1.6	\$1.6
Other Food Expenditures	\$1.9	\$1.2	\$2.0	\$1.9	\$2.0	\$2.3	\$2.0
Total Entertainment	\$4.1	\$2.9	\$3.6	\$4.4	\$4.3	\$3.6	\$3.5
Total Transportation	\$11.2	\$5.7	\$12.2	\$11.0	\$9.5	\$10.6	\$10.7
Inter-island airfare	\$4.4	\$3.4	\$4.7	\$4.4	\$2.3	\$4.7	\$4.5
Ground transportation	\$1.3	\$0.6	\$1.2	\$1.3	\$2.0	\$2.1	\$1.9
Rental vehicles	\$2.9	\$1.3	\$3.4	\$2.8	\$3.0	\$2.2	\$2.2
Other transportation	\$2.5	\$0.4	\$2.9	\$2.5	\$2.2	\$1.7	\$2.1
Total Shopping	\$16.4	\$8.6	\$15.7	\$16.9	\$15.1	\$18.1	\$17.1
Fashion and Clothing	\$4.7	\$2.9	\$4.6	\$4.6	\$5.1	\$5.9	\$5.5
Jewelry / Watch	\$3.9	\$1.9	\$3.7	\$4.2	\$2.8	\$4.6	\$3.3
Cosmetics / Perfumes	\$0.4	\$0.2	\$0.4	\$0.4	\$0.4	\$0.8	\$0.8
Leather Goods	\$0.2	\$0.3	\$0.2	\$0.2	\$0.2	\$0.5	\$0.5
Hawaii food Products	\$1.4	\$1.0	\$1.5	\$1.4	\$1.6	\$0.8	\$1.3
Souvenirs	\$4.2	\$1.6	\$3.6	\$4.6	\$4.0	\$4.2	\$3.8
Other Shopping	\$1.5	\$0.7	\$1.7	\$1.5	\$1.0	\$1.3	\$1.9
All Other Expenses	\$12.9	\$7.1	\$10.7	\$14.2	\$12.4	\$7.2	\$14.6
Shore Tour Spending	\$20.4	\$6.6	\$17.8	\$23.6	\$12.4	\$15.6	\$15.7
Shore Tour: Honolulu (Oahu)	\$3.1	\$1.2	\$2.4	\$3.8	\$1.7	\$1.9	\$2.7
Lahaina (Maui)	\$4.0	\$0.8	\$3.2	\$4.8	\$2.8	\$3.4	\$3.3
Kahului (Maui)	\$2.4	\$0.7	\$2.2	\$2.8	\$1.0	\$1.8	\$1.7
Kona side (Big Island)	\$1.6	\$0.4	\$1.5	\$1.7	\$1.0	\$1.2	\$1.4
Hilo side (Big Island)	\$4.1	\$1.3	\$3.6	\$4.6	\$2.8	\$3.0	\$3.4
Nawiliwili (Kauai)	\$5.1	\$2.2	\$4.8	\$5.8	\$3.1	\$4.3	\$3.2
Total Spending Per Person Per Day	\$98.7	\$42.6	\$90.0	\$105.1	\$91.2	\$93.3	\$97.9

Source: DBEDT